

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 8

ATTACHMENT: 1

ACTION: _____

DATE OF MEETING: November 9, 2000

INFORMATION: X

PRESENTER(S): Michael Carter

EXECUTIVE SUMMARY

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of September 2000.

I. Overview

- A. Fiscal Year Allowance Roll: CalSTRS paid a total of 167,312 benefit recipients \$304,760,593 in September 2000. The average monthly allowance roll for FY 2000/01 is \$300,917,704. Total disbursements for FY 2000/01 are \$902,753,111.
- B. Service Levels: All programs are performing within acceptable variance levels.
- C. Application Volume: An overall decrease of nine percent in comparison to the same period last fiscal year.
- D. Interest Payments: The total interest payment volume for September 2000 increased 276 percent as compared to September 1999. The dollar amount of interest paid increased 457 percent as compared to September 1999.

II. Individual Program Reports: Pages 1-7

III. Miscellaneous Items: Pages 8 - 10

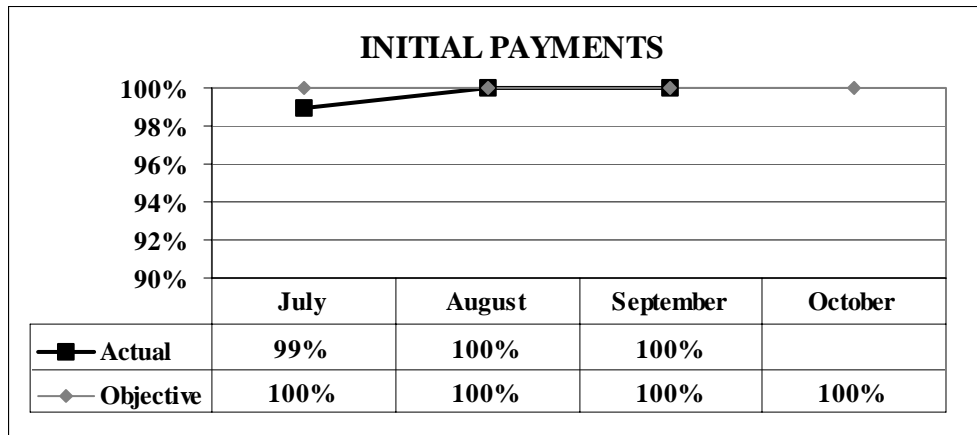
CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Service Retirements

Objective Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

Application Volume Change Minus 16 percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent



Year to Date Average: 100%

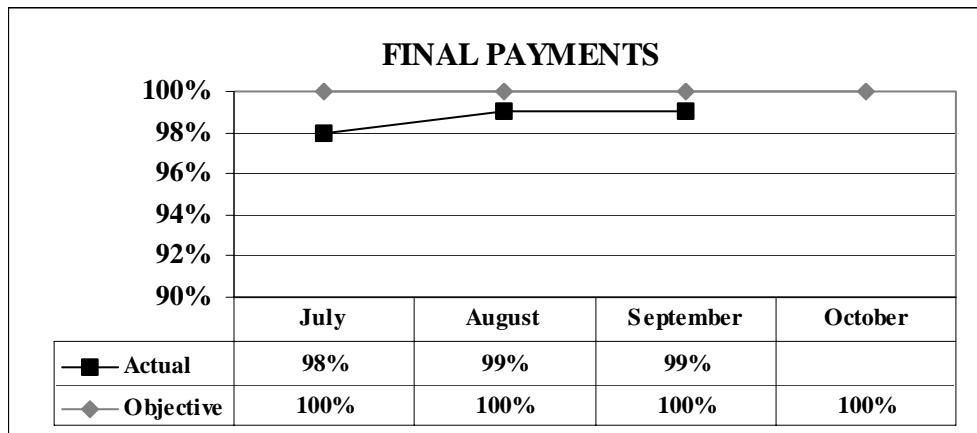
Objective Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

Interest Payments September 2000: 31 payments/\$384

Current Year Cumulative:
90 payments/\$876

Prior Year Monthly Average:
17 Payments/\$205

Baseline FY 1998/99 actual: 98 percent

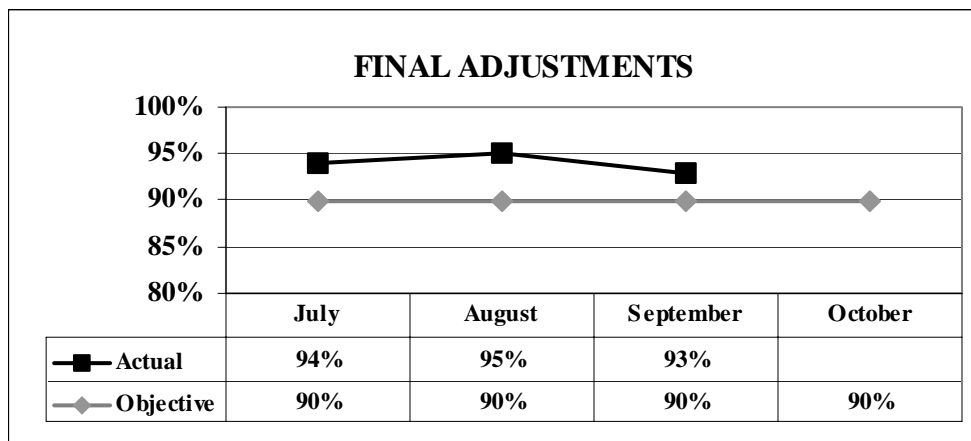


Year to Date Average 99%

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Service Retirements

Objective Finalize 90 percent of all payments within four months of the retirement effective date.



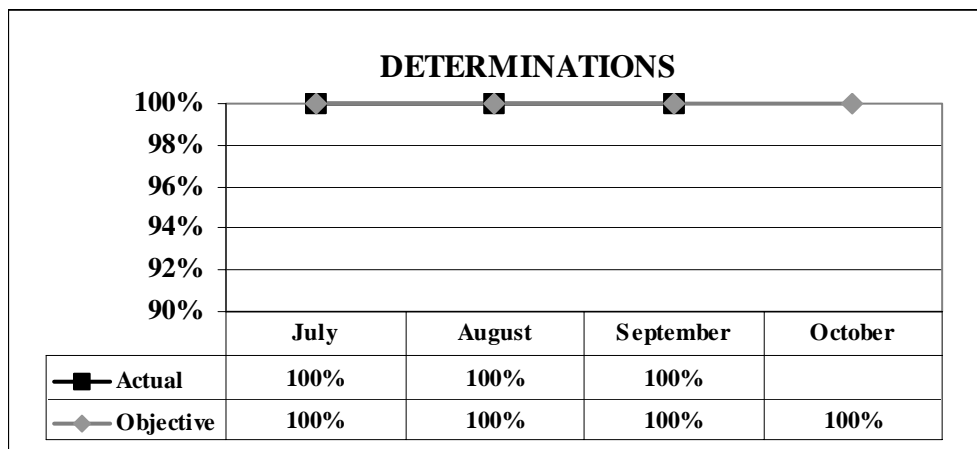
Baseline FY 1998/99 actual: 91 percent

Year to Date Average: 94%

Disability

Objective Process 100 percent of all eligible applications within 180 days of receipt.

Application Volume Change Minus 21 percent in comparison to same period last fiscal year.



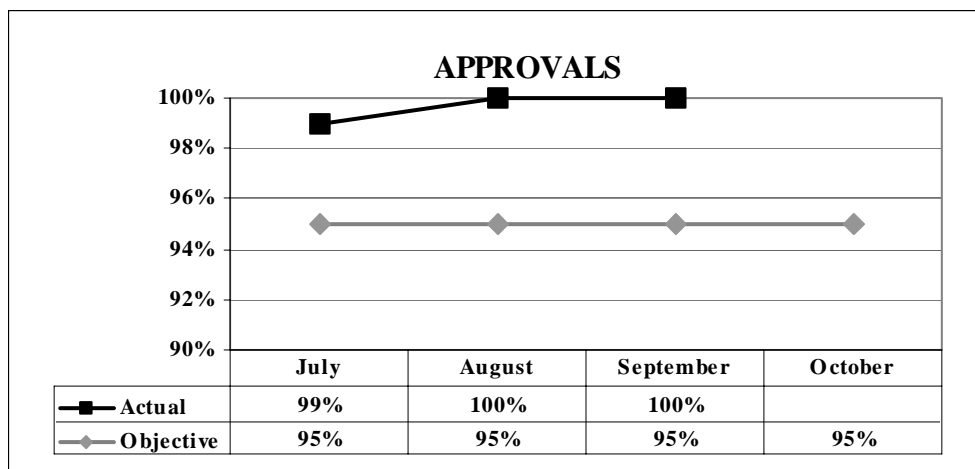
Baseline FY 1998/99 actual: 99 percent

Year to Date Average: 100%

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Disability

Objective Process 95 percent of all approvals within 30 days of receipt of all necessary information.



Baseline FY 1998/99 actual: 100 percent

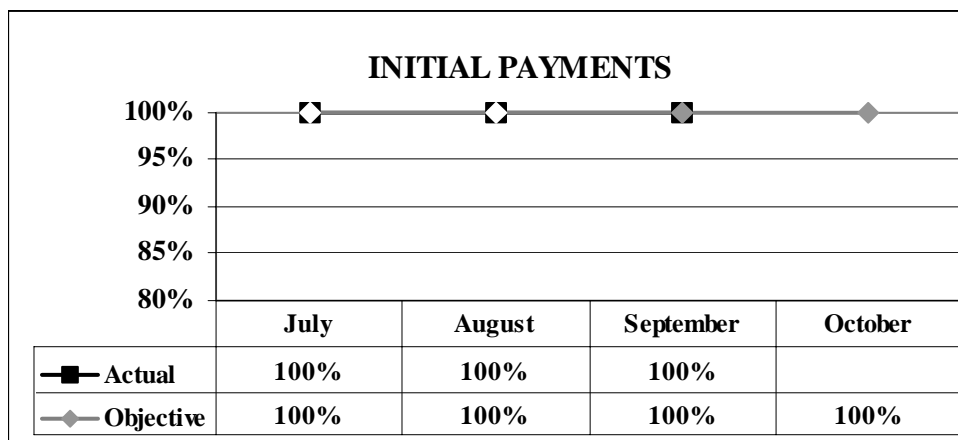
Year to Date Average: 100%

Objective Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

Interest Payments September 2000: 0 payments/\$0

Current Year Cumulative:
0 payments/\$0

Prior Year Monthly Average:
0 payments/\$0



Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 100%

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Survivor Benefits

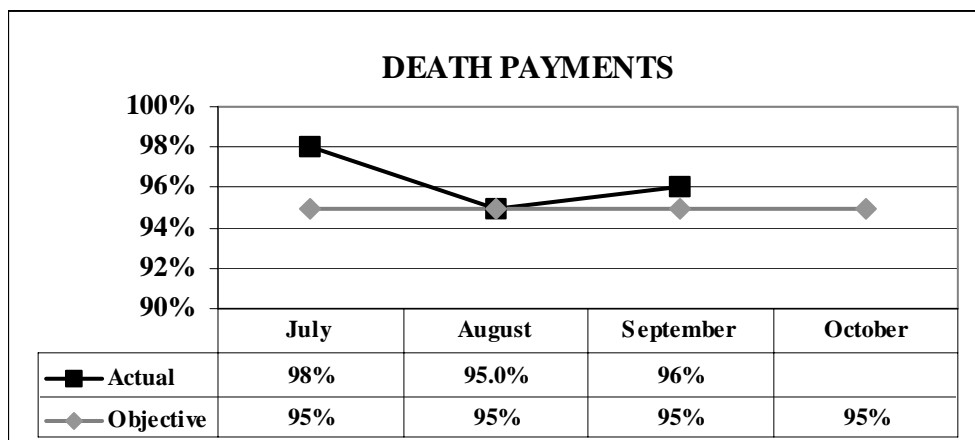
Objective Process 95 percent of all applications within 30 days of receipt of all necessary information.

Application Volume Change One percent increase in comparison to same period last fiscal year.

Interest Payments September 2000: 19 payments/\$855
Current Year Cumulative:
67 payments/\$3,705

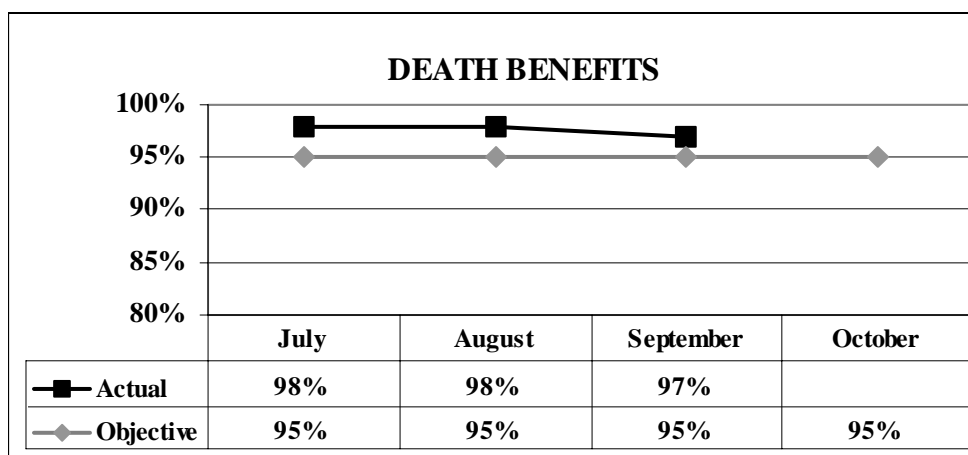
Prior Year Monthly Average:
34 payments/\$1,039

Baseline FY 1998/99 actual: 97 percent



Year to Date Average: 96%

Objective Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



Year to Date Average: 98%

Baseline FY 1998/99 actual: 93 percent

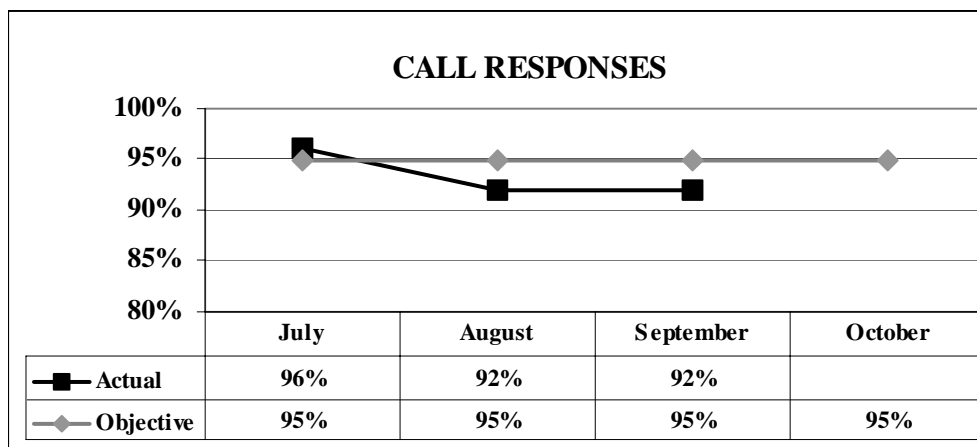
CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Public Service

Objective Answer 95 percent of all calls in less than three minutes.

Volume Change 5.69 percent increase.

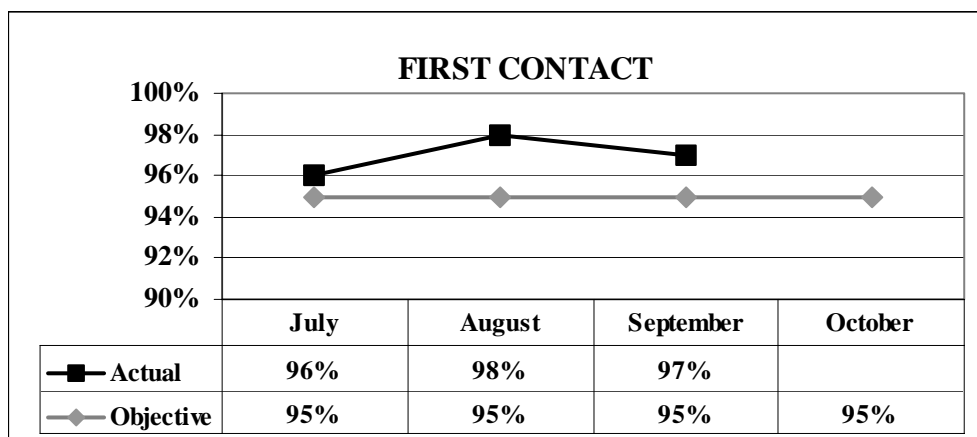
Notes Average queue time: 56 seconds
Longest queue wait: thirteen minutes



Baseline FY 1998/99 actual: 94 percent
FY 1996/97 Objective:
75 percent/less than three minutes.

Year to Date Average: 93%

Objective Answer 95 percent of all calls on the first contact.



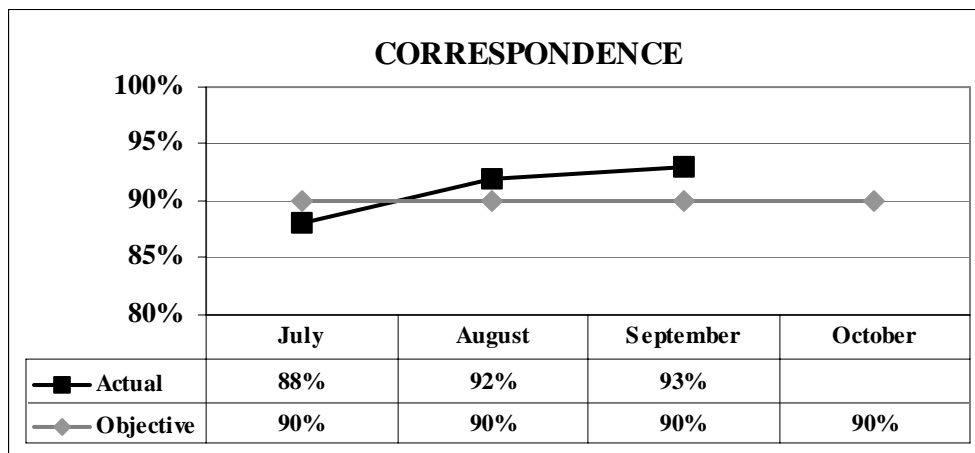
Baseline FY 1998/99 actual: 98 percent

Year to Date Average: 97%

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

Public Service

Objective Respond to 90 percent of all correspondence in ten working days.

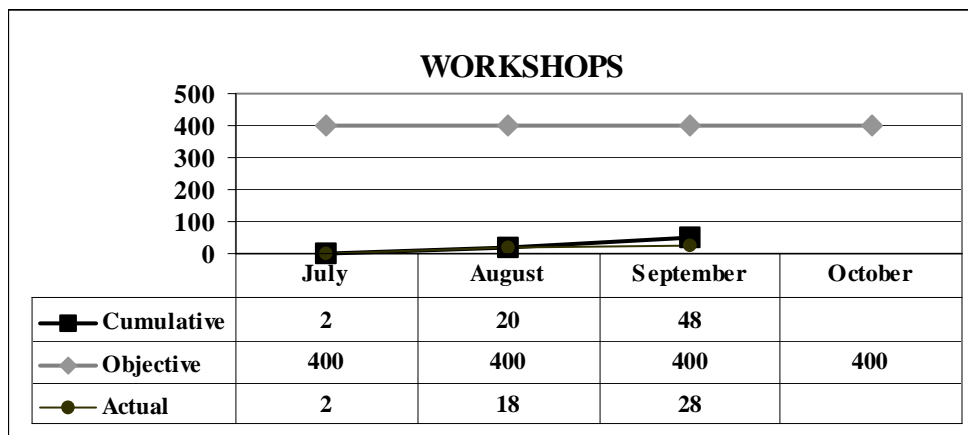


Baseline FY 1998/99 actual: 94 percent

Year to Date Average: 91%

Regional Counseling Services

Objective Conduct 400 workshops

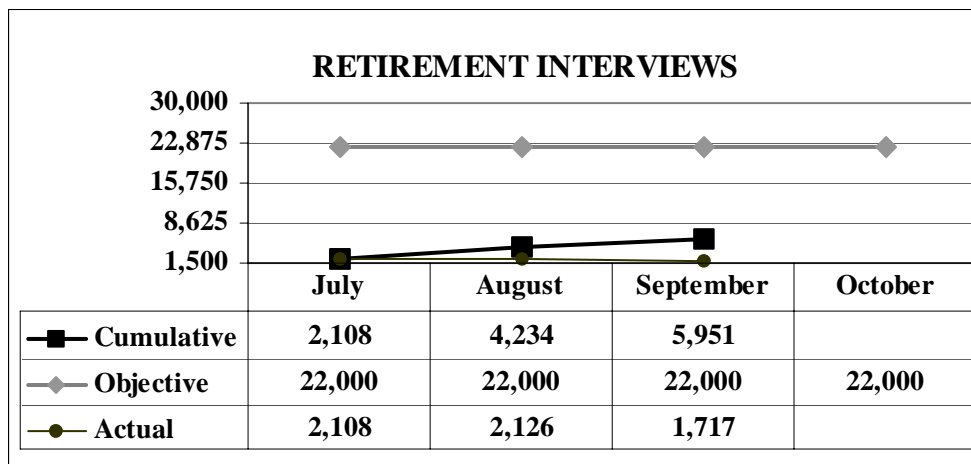


Baseline FY 1998/99 actual: 491

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

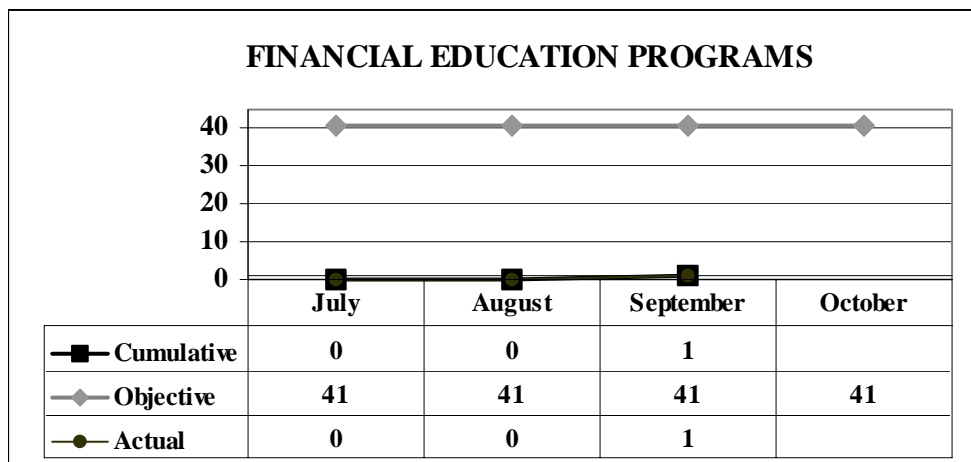
Regional Counseling Services

Objective Provide 22,000 retirement interviews.



Baseline FY 1998/99 actual: 24,657

Objective Deliver 41 Financial Education Program to CalSTRS members.



Baseline FY 1998/99 actual: 32

CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

III. Miscellaneous

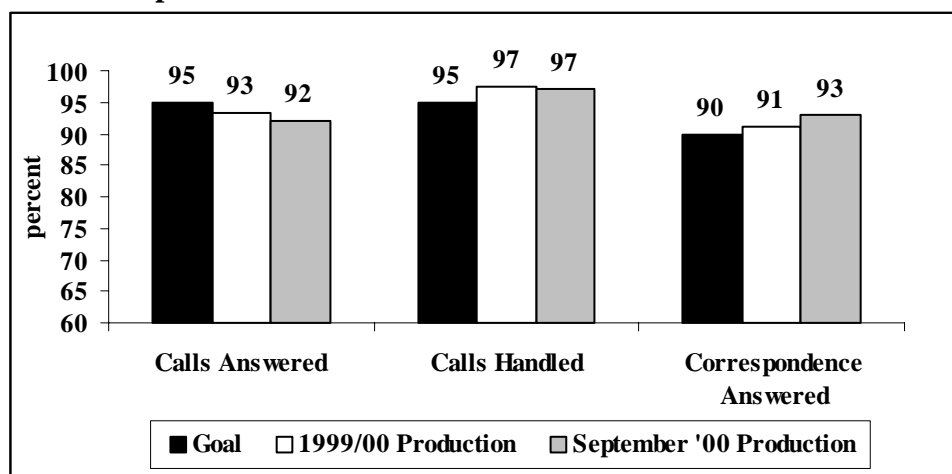
A. Outstanding Survivor Benefit Cases: The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of September 2000, there were 87 cases exceeding this threshold. In August 2000, there were 94 cases beyond the six-month processing period, while in July there were 138 cases exceeding the six-month threshold.

B. One-Year Final Compensation: During the current fiscal year, two school districts have chosen to participate in this program.

C. Golden Handshake:

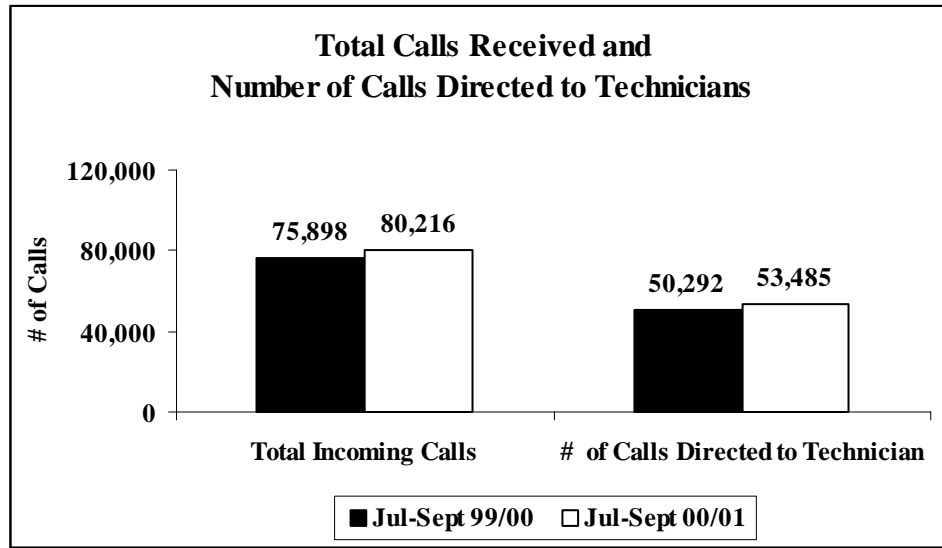
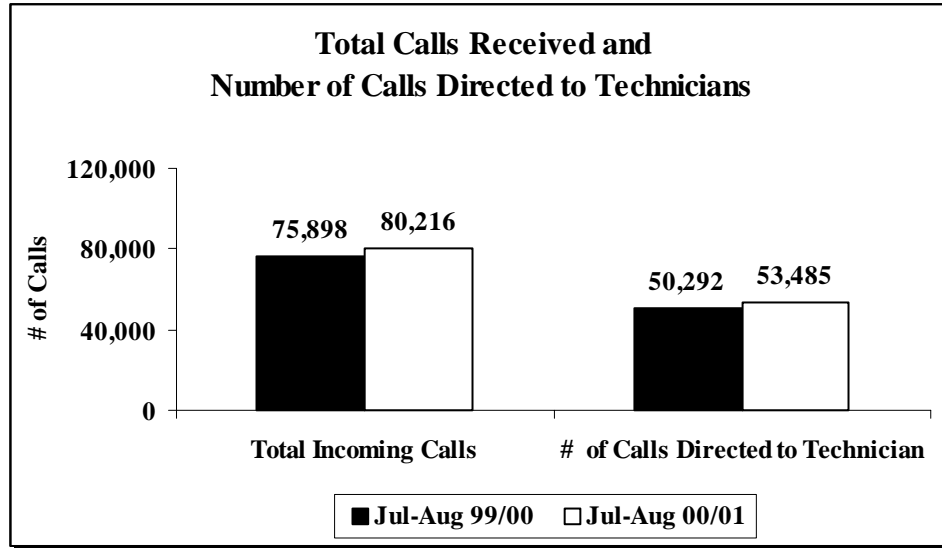
July – September 1999	43 districts / 30 participants
July - September 2000	29 districts / 86 participants

D. Telephone Center:



CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

D. Telephone Center: (continued)



CalSTRS PRODUCTION OBJECTIVES 2000-2001 FISCAL YEAR

